

**So how ARE we doing? Evaluations**

Books: *Pastor and People, Making Mutual Ministry Work*, Augsburg Fortress, 2003

*Holy Clarity, The practice of planning and Evaluation*, Sarah Drummond, Alban Institute

**10 things about evaluations in the parish.**

1. They can be simple or ornate, but they need to be there! Hopefully yearly.
2. The Community's ministry is evaluated—that means both the pastor and the people.
3. The goal is Eph 3: 16- 19

I pray that, according to the riches of God's glory,

God may grant you to be strengthened in your inner being with power through the Spirit, and  
that Christ may dwell in your heart through faith,  
as you are being rooted and grounded in love.

I pray that you may have the power to comprehend with all the saints,  
what is the breadth, and length and height and depth,  
and to know the love of Christ that surpasses knowledge ,  
so that you may be filled up with all the fullness of God.

4. Congregations that have a regular review process don't call the synod office for conflict resolution.
5. The mission plan of the congregation needs to be supported by the pastors and congregations goals—no plan, no real way to evaluate! Councils need to ask themselves regularly, what have we done to further our mission?
6. Evaluations support the ongoing growth of the community. What would you like to learn?
7. The call is a covenantal relationship, not a hire! So it is a mutual relationship and should be evaluated that way.
8. "We took a survey on our pastor," indicates some conflict. Difficult to respond or get beyond.
9. Evaluations push us to commit to reflection and written comments. These can help us understand the growth of the pastor and parish. They need to be shared with trusted leaders.
10. Peer review can be helpful especially in long term pastorates.

St. Andrew Lutheran Church, Beaverton, OR

www.standrewlutheran.com

Employee Ministry Self- Assessment

Call began \_\_\_\_\_

Review Date \_\_\_\_\_

### Introduction

*The following premises will underlay the concept of and practice of Ministry Review at St. Andrew:*

- 1. The process of ministry review is meant to be a time of learning for the staff person within a supportive context with colleagues and congregational staff members.*
- 2. Effective work focuses not on tasks but on results that serve to advance the overall mission of the congregation.*

A. Describe how your performance has contributed to St. Andrew's overall mission to Proclaim, Serve and Nurture.

B. Describe how you have assisted and supported other St. Andrew staff members in their contributions towards realization of the congregation's vision and mission.

C. How effective were you in meeting your identified goals for this review period? Please describe each stated objective and the resulting outcome.

D. Which barriers did you encounter that prevented you from working effectively? Did any of these obstacles impact your overall job satisfaction?

E. How would you rate your communication and interpersonal skills? please give specific examples.

F. How accurately does your job description reflect your current tasks and responsibilities?

G. Identify the areas in which you would like to grow and / or improve upon during the next review period. Describe any assistance you would like to receive toward this end, including training needs.

H. What are your specific goals and objectives for the next review period?

I. What do you envision as long-range goals for this position at St. Andrew?

J. Additional Comments - feel free to use the following space for evaluation comments not specifically covered under the previous sections.)

## **PERFORMANCE ASSESSMENT PROCEDURES**

The following premises shall underlie the concept and practice of Performance Assessment at St. Andrew Lutheran Church:

- Effective staff work is an expression of faithfulness and commitment to the overall goals of the congregation's ministry and to personal spiritual growth.
- Effective staff work focuses not on activities but upon results that serve to advance the overall mission of the congregation.
- Effective staff work is dependent on both individual commitment and team collaboration.

The purpose of the assessment is to:

1. Establish practical and measurable goals and objectives for the upcoming evaluation year that are consistent with the vision and mission of St. Andrew.
2. Review and evaluate the success in meeting past year's goals.
3. Recognize the past year's achievements.
4. Identify areas of improvement.
5. Identify professional development and personal growth needs.
6. Promote dialogue and feedback in a supportive environment.

All St. Andrew staff shall participate in the performance assessment process.

The first formal assessment shall be scheduled after 90 days of employment. Subsequent assessments shall be scheduled annually based on a common review date of February 15<sup>th</sup>. Pre-school Director and Instructor positions will be reviewed at the end of the school year in June.

It is the responsibility of the manager to maintain frequent and open communication on an informal basis to discuss the employee's performance and progress.

## Formal Assessment

The following evaluation forms shall be used for interim and annual evaluations:

- Employee Ministry Self-Assessment – (Completed by Employee)
- Employee Ministry Evaluation Summary – (Completed by Manager)

(Refer to Appendix B for samples.)

All employees and pastoral staff shall complete the **Self Assessment Form** and submit a copy to their manager no later than Feb 1<sup>st</sup> for annual evaluations and no later than one week prior to scheduled interim or pre-school annual evaluations.

(The Parish Administrator shall have the discretion to complete an abbreviated version of the assessment on behalf of her/his part-time direct reports based on a verbal interview, with the exception of the Parish Secretary.)

The employee's manager shall also complete the first two sections of the **Evaluation Summary Form**, outlining the employee's contributions and listing opportunities for personal and professional growth that were identified during the current evaluation period.

Upon receipt of the completed **Self-Assessment**, the manager shall then coordinate a meeting time with the employee and additional congregational members where applicable.

The Council President or her/his designated representative shall actively participate in the assessment of pastoral staff. In addition, a Human Resources representative shall be present at all core staff assessments.

The manager shall lead the assessment session, using the **Evaluation Summary** and the **Self Assessment** to initiate dialogue and discussion. The manager shall also ensure that the employee's stated goals for the upcoming assessment cycle are achievable, measurable, and in line with St. Andrew's strategic vision and mission.

Following the formal assessment, the manager shall complete the last section on the **Evaluation Summary** to summarize the discussion, identify any action items, and restate the agreed upon goals and objectives for the upcoming assessment cycle.

If the completed **Evaluation Summary** is mutually satisfactory to both the employee and the manager, the document shall then be signed by both parties and attached to the **Self Assessment Form**. A copy shall also be forwarded to the Human Resources Committee chairperson for final review.

All original assessment documents shall be retained in the employee's confidential personnel file.

## **Issue Resolution**

If the employee does not agree with the assessment, the employee shall meet with the manager to discuss her/his concerns within seven days of the assessment. Both parties may suggest changes to the assessment as a result of the discussion. It is desirable to resolve the issues together and attempt resolution at this stage.

In the event that the manager and employee do not resolve the issues, the following actions shall take place:

### **Staff:**

The employee shall prepare a written response to the assessment, attach it to the assessment and forward the documents to the Lead Pastor along with a letter requesting a meeting.

A meeting shall then be scheduled within seven days at which time the Lead Pastor will meet with the employee and manager together to discuss the employee's written response and ensure that the process used to create the assessment was appropriate. A Human Resources representative shall also be present at this meeting.

The Lead Pastor shall then provide both employees with a written summary of the meeting, indicating the actions that the Lead Pastor and Human Resources determine to be appropriate.

### **Clergy:**

The employee shall prepare a written response to the assessment, attach it to the assessment and forward the documents to the Council President along with a letter requesting a meeting.

A meeting shall then be scheduled within fourteen days at which time the Council President will meet with the employee and manager together to discuss the employee's written response and ensure that the process used to create the assessment was appropriate. A Human Resources representative shall also be present at this meeting.

If deemed appropriate by the Council President, a Synod representative may also be requested to participate in the issue resolution process.

The Council President shall then provide both employees with a written summary of the meeting, indicating the actions that the Council President, Synod representative and Human Resources determine to be appropriate.